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ABSTRACT

The Director of the Department of Cultural Affairs appointed a task force, to be chaired by the State Librarian of Iowa, to evaluate technologies available for libraries and potential uses for the technologies deemed valuable; discuss problems from the viewpoint of the library user in the establishment of cooperative programs; and develop a comprehensive long-range plan for library cooperation. In order of priority, the recommendations of the task force advocate: (1) support for multitype libraries (i.e., academic, public, school, special, and state) by transferring Iowa's approximately $1.5 million Library Services and Construction Act grant from the State Library to local libraries on a competitive bid basis; (2) an appropriation of $200,000 to the State Library to purchase an integrated, automated library system, and a $119,000 increase in appropriations for the State Library to cover costs of professional staff for statewide library automation consulting; (3) an increase of $4.1 million for "Information Iowa," which provides Iowans with access to materials and strengthens collections statewide; (4) expanded funds to cover the cost of a statewide delivery system and for the purchase and installation of a statewide telefacsimile network; (5) a statewide retrospective conversion of library records into machine-readable format; and (6) $550,000 to supplement interlibrary loan services in multitype libraries across the state. (SD)

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New Era For Libraries

A Report From the Iowa Blue Ribbon Task Force on Libraries

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January 1989

State Library of Iowa
A Division of the
Department of
Cultural Affairs

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EXECUTIVE SUMMARY

This is a New Era for Libraries! As a result of an information explosion, it is possible for people to have quick access to a tremendous quantity of information.

Iowa presently has many good libraries because of strong local library support. However, the opportunity is here to develop an outstanding library network accessible to each citizen of Iowa. To do this will require participation and leadership on the state level. State funding is necessary for effective multitype library cooperation (public, school, academic, and special libraries) and for the implementation of new technology.

The Blue Ribbon Task Force on Libraries recommends the following:

1. BASIC SUPPORT - Replacement of Federal funds in State Library budget	$ 880,000
2. STATE LIBRARY AUTOMATION	
Purchase and installation of equipment (one year only)	200,000
Staff for statewide consulting	119,000
3. INFORMATION IOWA - A FRAMEWORK FOR MULTITYPE LIBRARY COOPERATION	4,100,000
Collection development - 3,500,000 Open Access - 300,000 Interlibrary Loan - 300,000	
4. INFORMATION DELIVERY	257,000
TELEFAX NETWORK - (for each of 3 yrs.)	203,000
5. BUILDING A STATE DATABASE	2,000,000
6. MULTITYPE SERVICE (Expand regional library service)	550,000
ADDITIONAL STUDY	20,000

A NEW ERA FOR LIBRARIES represents a significant investment, but the returns on a statewide infrastructure for information are even greater!

CHARGE TO THE BLUE RIBBON TASK FORCE

As requested by the Legislature, the Director of the Department of Cultural Affairs appointed a Blue Ribbon Task Force, chaired by the State Librarian of Iowa, which was directed to:

1. Evaluate the new technology available for libraries and the potential for cooperative use of the technology deemed to be useful.
2. Discuss problem areas from the view of the library user in the establishment of cooperative programs.
3. Develop a comprehensive long-range plan for library cooperation that will provide for a sharing of resources and use of new technology. The plan shall include free and equal access to library resources to citizens of the state and a plan for funding the services and purchase and operation of the new technology.

(1988 Session Laws, Chapter 1284, Section 4)

IDENTIFIED GOAL

In response to this charge, the Blue Ribbon Task Force identified the following goal:

Every citizen in Iowa should have the right to walk into any publicly funded library and have use of its collections and services and obtain access to other holdings of the state. Iowans are entitled to public access to all forms of information.

BACKGROUND INFORMATION

This is a new era for libraries! As a result of an information explosion, it is possible for people to have quick access to a tremendous quantity of information. Through the utilization of new technology and through interlibrary cooperation, Iowa can enter the new Information Age.

Excellence in library service requires a partnership in funding from all levels of government: federal, state, and local. Local governments in Iowa are doing their share. In fact, according to the 1987-88 American Library Directory, Iowa ranks sixth in the nation with a per capita local public library expenditure of $16.68. The federal government continues to do its share by annually allocating to Iowa approximately $1.5 million through the federal Library Services and Construction Act. Forty three states currently provide direct financial support to local public library budgets. Iowa is not one of them. Iowa provides no direct public library assistance to local public libraries.

Because of strong local support, Iowa is a state with good public libraries, — but the opportunity is here to develop an outstanding informational network available to each citizen of Iowa. By capitalizing on the local library investment and by utilizing modern technology, Iowa can achieve a sophisticated statewide library network that delivers information for both individual use and for the economic development of the state.

State funding is essential to build an infrastructure which will support statewide interlibrary cooperation and sharing of library materials. The proposals of the Blue Ribbon Task Force will achieve a New Era for Libraries by encouraging:

1) MULTITYPE LIBRARY COOPERATION - Programs to provide incentive and equitable reimbursement for multitype library cooperation (cooperation between libraries of various types, e.g., public, school, academic, special, or business) and

2) NEW TECHNOLOGY - Programs to implement modern library technology which will then allow more sophisticated and cost-effective resource sharing.

RECOMMENDATIONS OF THE BLUE RIBBON TASK FORCE

To achieve a New Era for Libraries, the Blue Ribbon Task Force presents the following six recommendations, listed in priority order:

Recommendation No. 1. "BASIC SUPPORT"

The Iowa General Assembly should increase the annual appropriation for the State Library in the amount of $880,000 in order to replace the Federal Funds in the State Library budget.

When the federal Congress passed the Library Services and Construction Act, its intent was to improve local library service. The State of Iowa has chosen to use approximately 60% of the annual federal grant for the operation of the State Library.

The Iowa LSCA Advisory Council, a federally-mandated council of lay and professional representatives from throughout the state, in its 1988 Iowa LSCA Annual Program, charged the State Library "To increase the availability of federal dollars to local libraries for improvement of local library services by moving towards replacement of federal funds within the State Library of Iowa budget."

The Federal Audit Report, issued February 23, 1988, on the State Library's use of LSCA funds, states that "expenditures of Federal program funds may not be viewed as general expenses required to carry out the overall responsibilities of a State agency." As a result of the Auditor's findings and recommendations, the State Library made an agreement with the U. S. Department of Education to try to increase the State support of the State Library and reduce its dependence upon federal funds.

The operation of the State Library is a basic responsibility of state government. The entire LSCA grant to the State Library (approximately $1.5 million) should be used for a competitive grant program for local libraries for such purposes as the renovation and construction of library buildings and the development of innovative services.

Recommendation No. 2. "STATE LIBRARY AUTOMATION"

The Iowa General Assembly should appropriate $200,000 to the State Library for the purchase and installation of an integrated automated library system and, in addition, increase the annual appropriation for the State Library in the amount of $119,000 to cover computer maintenance costs and adequate professional staff for statewide library automation consulting.

The State Library should automate its operations both to improve direct service to patrons and to establish its role as the key node in an emerging statewide electronic bibliographic network. While there are significant benefits to automating the internal operations of the State Library, the need to automate is made compelling by the fact that the State Library must continue to play a major role in fostering resource sharing among libraries throughout the State. As the major academic and public libraries of Iowa implement automated systems, there is great potential for electronically linking or interfacing the systems to facilitate resource sharing. The development of the electronic network will be much smoother if the State Library, which is mandated to serve all libraries, plays an active role by promoting standards and consulting services. It can also monitor network activity and provide leadership in the development of network protocols. The State Library cannot do so — nor can it make its own resources easily available — unless it automates, and its system can function as a node in the network.

The additional professional automation and consulting staff will allow the State Library to provide automating assistance to the libraries of the state and to promote the Open System Interconnection (OSI) Reference Model as the means of linking local library systems in the future.

This automated system also will allow the State Library to improve library services for state government through the coordination of collection development, acquisitions, library technical services, circulation, and information services. Remote terminals would be located in government offices and in other state agency libraries.

Recommendation No. 3. "INFORMATION IOWA — A FRAMEWORK FOR MULTITYPE LIBRARY COOPERATION"

The Iowa General Assembly should increase the annual appropriation to the State Library in the amount of $4,100,000 for "Information Iowa" — a proposal to provide citizens of Iowa with access to materials not in their local libraries and to strengthen library collections across the state. There are three components to this proposal:

Collection development	$3,500,000
Open Access	300,000
Interlibrary loan	300,000
	$4,100,000

No funding measure the legislature could adopt regarding libraries would have a more significant, positive effect on the average Iowan. The collection development funds provide an incentive for libraries to participate in cooperative resource sharing programs. The libraries which choose to participate (whether public, academic, or school libraries) will use these funds for additional informational resources — additional books, periodicals, audio-visual materials, or access to electronic databases. The funds will be distributed on a per capita or per student basis.

Opportunities for coordinated collection development would be explored and encouraged. For example, one library may choose to specialize in business materials and another may specialize in medical materials. By sharing these resources, the total number of unique titles available to Iowans is significantly increased.

Libraries are the depositories of our past and the key to our civilization's future. Funding for library collections is a simple concept that most people respond to very positively because they instinctively recognize the "public good" which libraries provide. Information is as basic to responsible citizenship as the right to vote. The strength of an educational institution rests in its library. Libraries provide free information on all subjects representing all points of view.

However, information is expensive. The average cost of a book published in the United States is $35.35; an average serial title costs $71.41. International materials run much higher. The inflation index for library materials has outstripped increases in the Consumer Price Index in recent years, with costs rising nine to ten percent compared to the 3.7% CPI increase.

Information is being produced at unprecedented rates. To cope with this nearly overwhelming amount of material, many vendors have packaged data in electronic format. This creates new ways of seeking and manipulating information, but also new expenses for libraries.

It is time for the state to help. We boast of our excellent educational system and justifiably so, but current funding methods do not promote cooperation among the multitype libraries (public, academic, school, and special libraries) in the Iowa library community. Each institution has a primary responsibility to its funding source and to the people represented by that funding source. State funding is necessary to provide an incentive for multitype library cooperation and to provide an equitable reimbursement for service.

This proposal, "Information Iowa", not only will help Iowa libraries build strong, coordinated collections but it will also provide an incentive for libraries to share these resources. To receive the collection development funds, a library must participate in both Open Access and in interlibrary loan. However, if a library chooses to participate in only Open Access or only interlibrary loan, it will be reimbursed for that service.

Open Access will allow Iowans who are registered with a participating library to go to any other participating library and directly borrow materials. When people are in search of information for their daily lives, they have little patience for red tape and jurisdictional issues; they want to be able to use the most convenient library and the one that has the information they need. Unfortunately, they currently cannot do so. Usually only the residents of a particular community can use that community's public library and only students at an academic institution can use the school library. Through Open Access the collections and services of all participating libraries will be available for the direct use of all registered library users. The funds for this portion of the proposal would be used to reimburse libraries for the service that they provide to people from other libraries.

Open Access is the most cost-effective form of resource sharing. However, it is not always possible for a library user to travel to another library. Sometimes, because of distance or lack of transportation, a library user must ask the local library to borrow the desired item from another library. This is interlibrary loan — an item is sent from one library to another library for a person's use.

Interlibrary loan is expensive for the loaning library. Materials must be retrieved, processed, possibly photocopied, and packaged for delivery. To ensure participation, state funds should be allocated to reimburse libraries for net lending services.

These three components, collection development, Open Access, and interlibrary loan, work together to build stronger libraries in Iowa and to encourage the sharing of resources. Multitype library cooperation is successful only when it benefits each participating library. Therefore, strong financial support at the state level is essential for multitype resource sharing. Through this proposal, "Information Iowa", state funds will provide an incentive for resource sharing, will build stronger Iowa libraries, and will provide equitable reimbursement for the costs incurred by participation in Open Access and interlibrary loan. "Information Iowa" — is a program for free and equal access to information for the people of Iowa.

Recommendation No. 4. "INFORMATION DELIVERY"

The annual appropriation for the State Library should be increased by $257,000 to cover the cost of a statewide delivery system and there should be an additional increase of $203,000 for each of three years to allow for the purchase and installation of a statewide telefacsimile network.

When people go to a library for information, they usually need that information quickly. In order for interlibrary loan to be an effective way to share resources, libraries must have a fast and inexpensive way to move library materials from one library to another. The goal of this statewide delivery system is to deliver interlibrary loans within three working days to any requesting library in the state of Iowa.

This system would connect the K-12 schools, the public libraries, and the academic libraries of the state. This free and convenient delivery service would encourage many more libraries to offer interlibrary loan services to their patrons.

The proposed statewide delivery network would be built upon a combination of delivery services and would take advantage of existing delivery vans. When possible, the Area Education Agency Media Services' vans would provide multitype library delivery within the AEA regions. Each AEA will have to assess its own ability to handle a higher volume of delivery and additional delivery stops. In a few cities, municipal library delivery vans can be a part of the state delivery network. Additional delivery service, as needed within an AEA region and as needed for statewide linkages, will be provided through contract with a commercial carrier. The AEAs, the Regional libraries, the Department of Education, and the State Library will need to work together to plan the details of a cost-effective statewide delivery system.

At times, however, a three-day delivery system still is not fast enough to provide information when it is needed. What is necessary for that situation is electronic document delivery through a telefacsimile network.

Resource sharing is greatly facilitated by electronic speed; businesses, government offices, hospitals, and individuals need information quickly for key decisions.

This recommendation is for a network of 122 telefacsimile sites including each ICAN location (the Iowa Computer Assisted Network) and other key library locations determined through individual library application and approval by the State Library.

Iowa has tremendous information resources in its public, academic, school, and special libraries; through a statewide delivery and telefacsimile network, these resources can be put to work for Iowa.

Recommendation No. 5. "BUILDING A DATABASE - WHAT IS LOCATED WHERE"

There should be a one-time appropriation to the State Library in the amount of $2,000,000 for the support of the building of a statewide database for library materials by subsidizing the conversion of existing library bibliographic records into machine readable format.

The ability to locate titles owned by Iowa libraries is the cornerstone of equitable resource sharing. At a minimum, the titles owned by all publicly supported libraries should be known to the citizens of the State through the present union lists most commonly used — the OCLC online catalog and the Iowa CD-ROM union catalog (the Locator). According to State Library records, approximately 50% of the holdings of the Iowa academic libraries and public libraries and 18% of the school library holdings are in machine readable format. The State has a long way to go before full information regarding the titles owned by its libraries can be fully known to the citizens of the State.

Program:

1. Funds to be disbursed by the State Library.
2. Reimbursement at the rate of $.50 per title converted.
3. To be eligible for receiving the reimbursement, libraries must participate in interlibrary loan activities with other libraries in the state.
4. Priorities for awarding funds:

   1st — Libraries with less that 51% of titles in machine readable form.

   2nd — Libraries with greater than 50% and less than 76% of titles in machine readable form.

   3rd — Libraries with greater than 75% and less than 100% of titles in machine readable form.
5. Machine readable records must be in full U. S. MARC communications format.
6. Tapes of machine readable records must be made available to the State Library for inclusion in a state database. With the permission of the library, these records may also be made available to a national database.

Funding requested: $2 million to provide reimbursement for the creation of 4 million title records at a reimbursement rate of $.50 per record.

Recommendation No. 6. "MULTITYPE SERVICE"

The Iowa General Assembly should pass increased annual appropriations in the amount of $550,000 for the Iowa Regional Library System for FY90 and each year thereafter (with appropriate annual cost increases) for the expansion of interlibrary loan and information services to all libraries, public, school, special, and academic within the State.

Access to information is a basic need of all Iowans, regardless of the type of library they use. At the present time, only a small portion of the academic, school, and special libraries in the state have direct access to the established interlibrary loan system or have arrangements with other libraries to pursue answers to questions that cannot be answered with their own resources. This remains the situation even after the Iowa General Assembly has recognized the need and legislated that such basic needs be addressed by the Iowa Regional Library System. Outside of curriculum support through the Area Education Agencies (AEAs) and the regional libraries, no other system exists to address these needs.

Currently the Regional Library System, comprised of seven separate operating offices, have been funded sufficiently only to provide basic reference and interlibrary loan service to the 525 public libraries in Iowa. Additional funds in the amount of $550,000 would allow the regions to extend interlibrary loan and basic reference service to the approximately 1900 school and college libraries currently not being served. These funds would provide for increased staff and operational equipment (primarily WATTS lines).

ADDITIONAL STUDY NEEDED

In addition to the six recommendations for projects to facilitate multitype library cooperation, the Blue Ribbon Task Force also recommends that the appropriation for the State Library be increased by $20,000 to allow for the ongoing study of current library issues. The Iowa Code mandates that:

"To insure that the concerns of all types of libraries are addressed, the division (the State Library) shall establish a long-range planning committee to review and evaluate progress and report findings and recommendations to the division and to the trustees of the Iowa regional library system at an annual meeting." The appropriation for added study will be used by the long-range planning committee and appropriate subcommittees for the following studies:

1) The further study of utilizing telecommunications networks and technologies to facilitate resource sharing. In particular, can the fiber optics network of Narrowcast Television be used to reduce the costs of library data transmission?

2) The further study of the Open Access program to ensure the ability of as many libraries to participate as possible.

3) The further and continuing study of effectiveness of current tools used to access Iowa resources.

   a) Investigate the effectiveness of the Locator and ICAN. Evaluate whether they are providing the best access to Iowa library resources at the most reasonable costs.

   b) Investigate the expansion of OCLC use in the state to determine costs, interests, and the impact on enhanced access to the holdings of Iowa libraries.

4) The further study of improving salaries and continuing educational opportunities for library personnel to provide better service for the citizens of Iowa.

5) The further study of how to market library services to raise awareness and equal access to information. Marketing is an integral part of a state library network. A unified concept of library services and resources needs to be developed that will promote utilization of the network by Iowa's citizens, businesses, and institutions.

Finally, the Blue Ribbon Task Force recommends that the State Library continue to involve representatives from ALL SEGMENTS of the library community on committees, task forces, and study groups dealing with resource sharing and access to information for citizens of Iowa. The multitype approach used by this Blue Ribbon Task Force has been invaluable and is the only way that Iowa can reach the goal of providing to every citizen the right to walk into any publicly funded library and have use of its collections and services. Through state-funded multitype cooperation and through the implementation of new technology, Iowa will reach a "New Era for Libraries."

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